Matrix Marketing Online User Guide

We know who your clients should be...

Introduction to Matrix Marketing Online Business Directory

www.mmonline.co.za User Guide……….

A Matrix Marketing (Pty) Ltd. product.

Thank you for subscribing to the most powerful source of Business to Business contact information available in South Africa.

At Matrix Marketing Online Business Directories, the most innovative South African business to business intelligence package, we are interested in only one thing – that we grow your business.

Our products will tell you where to sell yours.

This gateway has the potential to place your sales efforts where they count….. in front of decision making executives.

This purpose built, simple to use, database slice and dice program, with access to 16 of the country's most accurate, up to date, business to business databases, provides unquestionably the most powerful sales prospecting system available. With its ability to show contact names, responsibilities, addresses, telephone numbers, email addresses, web addresses, size of company and many more fields of information, it will empower your sales team dramatically.

Our specialist research team ensures that the data provided is of the very best quality and our data updating facility makes sure it stays that way.

The software provides for unlimited searches and views, included in the rental price, and unlimited exporting of data, depending on the credits purchased.

Matrix Marketing's data carries an A grade **Post Office PAMMS** certificate for accuracy.

An **Assegai** and a **PMA Golden Arrow** award have been earned for outstanding data quality and ingenuity in making information easily accessible for promoting business development in South Africa. As members of the Direct Marking Association, we pride ourselves in following all the guidelines regarding access to information and encourage our clients, to likewise comply.

This User Manual has been carefully prepared and will help you quickly understand the basics when using the software, however, we are only a call away, (during office hours (on (011) 886 0494)).

Best wishes

The Matrix Team.

MATRIX ONLINE BUSINESS DIRECTORY
USER GUIDE

Getting to the Home Screen – www.mmonline.co.za

Matrix Online can only be found by typing in the website address www.mmonline.co.za into the address bar. We recommended that you add this site, once found, into your "favourites" so that you can easily access this site in the future. Rename it to **_Matrix Online_** once you have added it to your favourites.

PLEASE NOTE: It is recommended that Internet Explorer 8 and all versions of Mozilla Firefox be used for optimal performance of this website.
If you're using Internet Explorer 9 or 10, images might not show up, menus might be out of place and text boxes could be jumbled. This is caused by a compatibility problem between the two sites. When a site is incompatible with Internet Explorer, you'll see the Compatibility View button next to the address bar.

To turn on Compatibility View

1. See if the Compatibility View button ▨ appears next to the Address bar. (If you don't see the button, there's no need to turn on Compatibility View.)

2. Click the Compatibility View button ▨ to display the site in Compatibility View.
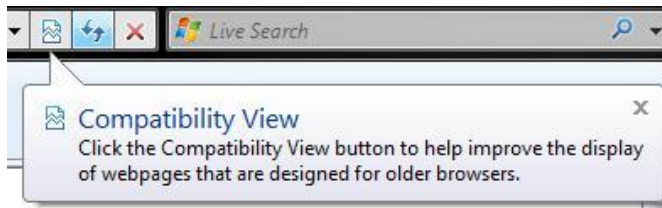
Once you turn on Compatibility View, Internet Explorer will automatically show that site in Compatibility view each time you visit. You can turn it off by clicking the ▨ again.

Home Screen

(t) +27 (0) 11 886 0494   (w) www.matrixmarketing.co.za   (e) info@matrixmarketing.co.za

Login

After receiving your user credentials via email, enter the details into the "Sign In" section and click the "Go" button. To proceed, accept the Terms & Conditions.

Once successfully logged in you will see the screen below.

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Main Menu Options

Main Menu Tabs

Description of each tab on the menubar.

"Home" - This tab will direct you to the first screen shown immediately after login. This screen is known as the **search builder** page and will allow you to build your search, based on geographical location, industry and number of staff. Should you not wish to use any of these three search criteria, just click search to run the entire dataset.

"My account" - This tab enables users to navigate through their account details. Details listed here are company and contract details, linked users, history and export history. Here you will also see your Matrix account managers details.

"Notes" – This tab enables users to access all notes that have been made on the Matrix Marketing Online platform. The notes function is a CRM tool which will enable users to keep up to date with prospective or current clients.

"Saved searches" - This tab enables users to navigate back to "Saved Searches". Users have the ability to save the actual search criteria that was used.

"iTAM" - Stands for **Identify your Total Available Market**. The "iTAM" module is used as a strategic tool to identify your Total Available Market. (Please note, to have access to this facility contact Matrix Marketing for additional product license information). For more information see page 35.

"Terms and Conditions" - This tab lists Terms and Conditions relevant when accessing the Matrix Marketing Online platform.
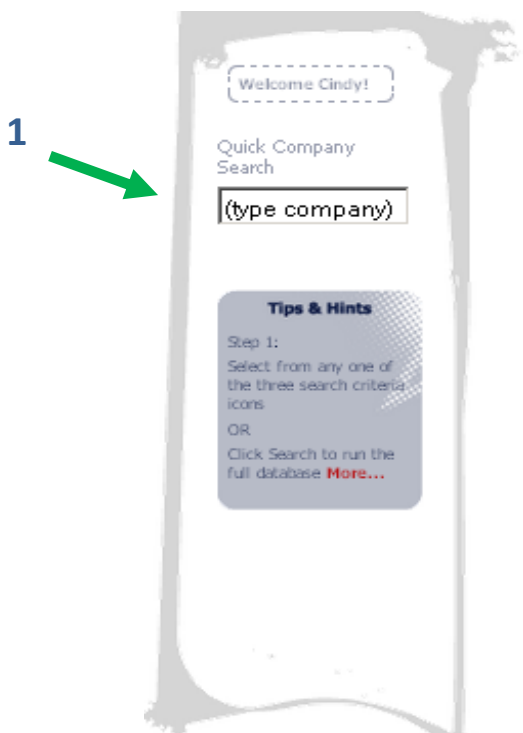
"Contact us" - Will re-direct you to our website, were you can view our physical address and relevant contact details.

Search Builder

Search Builder – this facility allows you to use multiple search criteria at once.

1. Quick Company Search

Here you can search for a Company you already know the name of. The system searches within company name and trade name fields. Always use varying options: Acronyms need to have spaces between letters and sometimes the company name has been registered as the full name and not the abbreviated version. Example: ABC Shoes (Pty) Ltd must be typed with spaces in between each letter i.e. A B C Shoes (Pty) Ltd.

1

Welcome Cindy!

Quick Company
Search

(type company)

Tips & Hints

Step 1:

Select from any one of the three search criteria icons

OR

Click Search to run the full database **More...**

A minimum of 4 characters must be entered for the automatic search results to appear. You will notice that whilst you are typing, all companies with the letters you have typed start to appear. For example type: Matrix

Quick Company
Search

Matrix

Select the company

Matrix Computers		
Matrix Corporate & Theatre Sound C C		Pro
Matrix Fitness S A (Pty) Ltd		Pro
Matrix Investments (Pty) Ltd	(Vodacom 4 U)	Pro
Matrix Marketing (Pty) Ltd		Pre C

When the correct company appears, click on it and you will be directed to that company's record.

Search Builder – Geographical, Industry, Number of Staff

The Search Builder consists of 3 basic search categories commonly used.

Choose one of the above or select from all three, if you do not want to use any of the 3 criteria selectors above, simply click on the Search button. The system will default to all companies on our dataset.

Search Builder – Step by Step

Search by Geographical Area

Choose only one of the three Geographical icons i.e. Provincial or Grouped Area or Suburb
NOTE: Do NOT search for a Suburb by choosing the Province or Grouped area it falls into. If you search for a Province and a suburb that falls outside this Province, the system will not find any matching companies.

2. Searching – Geographically by Province

Most sales people work in geographical areas, so this initial selector is important, whether it be by province, grouped areas or specific suburbs.

When searching by "Provincial" you are able to select more than one province at a time.

Hold your "shift" button and highlight from top to bottom or use your "control" (Ctrl) key and select the provinces you wish to search by (standard windows functionality).


3. (a) Searching – Geographically by Grouped Area

When searching by "Grouped Area" you are able to select more than one Grouped Area at a time. Hold your "shift" button and highlight from top to bottom or use your "control" key and select the Grouped Areas you wish to search by.

3. (b) Searching – Geographically by Suburb

When searching by "Suburb" type the suburb name into the search box and click the "Find" button. You are able to select more than one Suburb at a time. Include each suburb that you wish to keep, by highlighting it.

If you do not highlight the suburbs you want, they will not appear in your search result. You can also hold the "shift" button and highlight from top to bottom or use the "control" key and select the suburb/s you wish to include in your search (standard windows functionality). Should you wish to clear your search, click on the "Clear" button.
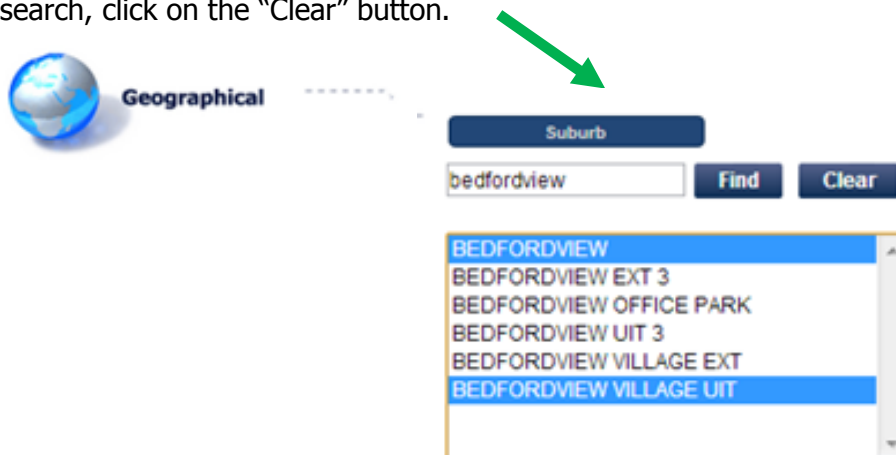
Search by Industry

4. Searching – By Industry Type

Industry search is great for uncovering vertical markets important to you. Matrix Marketing covers in excess of 443 Lines of Business.

Each Industry is searchable by a "string" search. For example: Manufacturing: To search for all companies in the manufacturing industry, you can type part of the line of business or industry into the search box and click the "Find" button (see below).
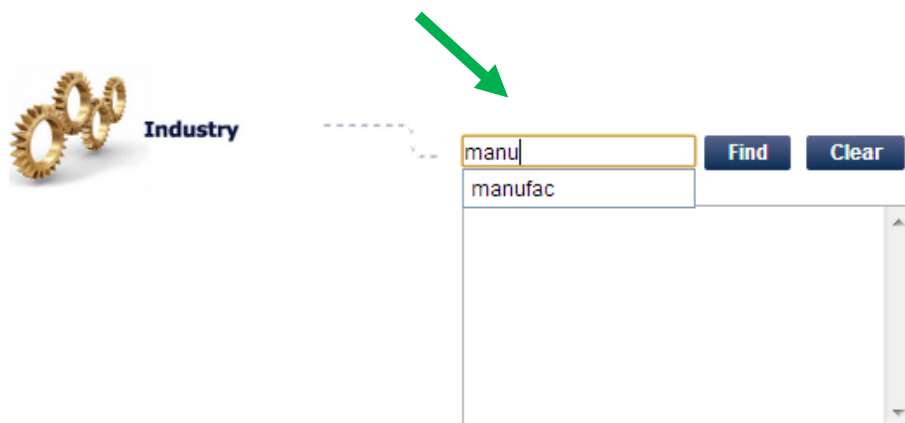
Search for multiple industries by **highlighting** the ones you want to keep, before adding more industries to your search criteria.

You can also hold the "shift" button and highlight from top to bottom or use the "control" key and select all the industries you wish to search by (standard windows functionality).
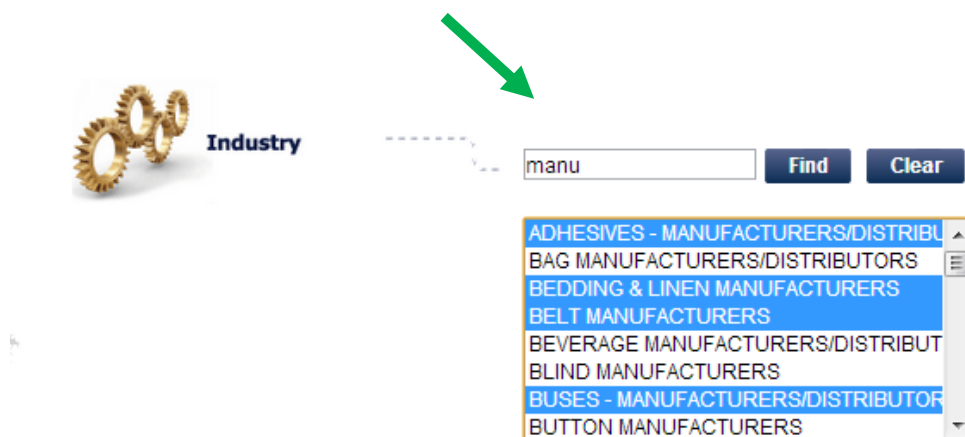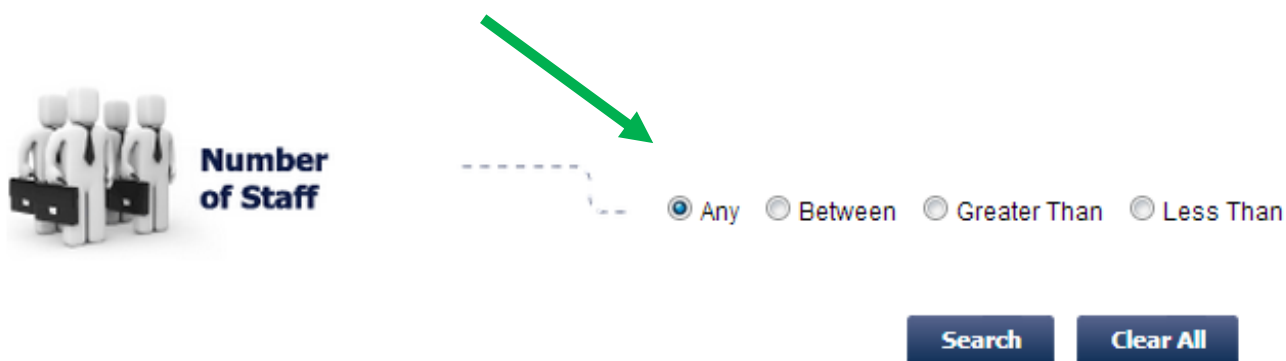
Search by Nymber of Staff

Searching Staff Size:

The "number of staff" indicator is the most powerful way of getting to grips with the size of the company.

As shown below there are 4 options to search number of staff by.

If you select "Any" then all staff sizes will be included in your search.

Using the search operator "Between" as per the example above, will give you companies with staff from 20 to 100.

Using the search operator "Greater Than" as per the example above will give you companies with staff greater than 200, it will include all companies from 201 staff and more.

Using the search operator "Less Than" as per the example above will give you companies with staff less than 200, it will include all companies from 199 staff and less.

Once you have made your selections using the search criteria above, click "Search". You will be taken to the search results page containing all the matching companies according to your selections.

Analyzing the Results of your Search - Search Results Page

Here you will see all companies and people matching your search criteria.

The search results page has 2 tabs:

1 Company Results tab (the system is defaulted to this tab)

2 People Results tab

Each tab displays different information and is discussed below.
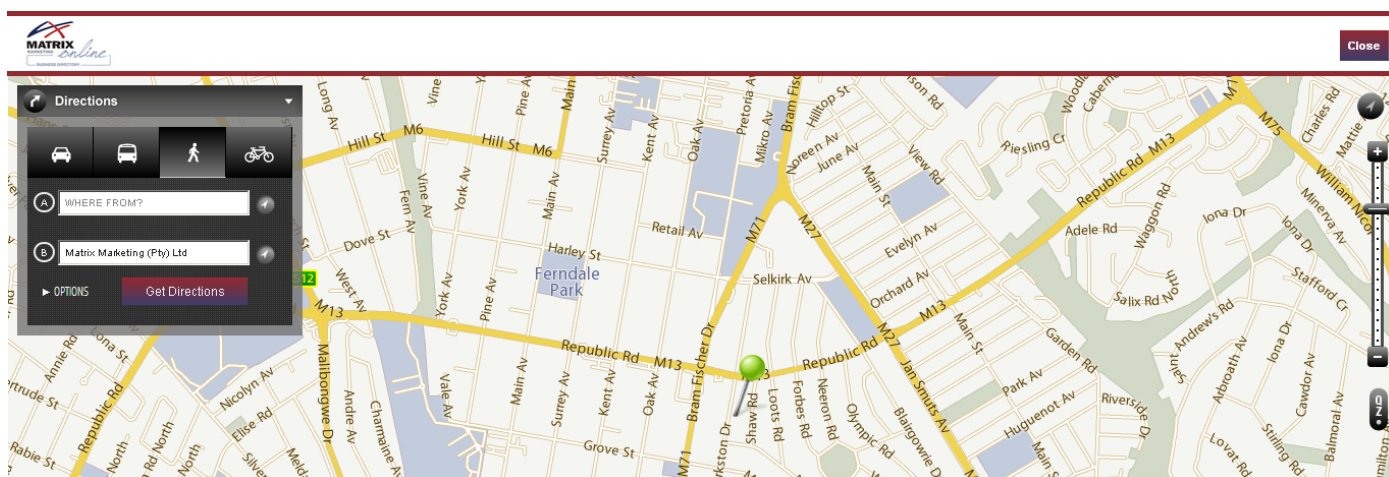
1. Company Results Tab

Your search returned **66883** companies – this tells you the total number of companies that matched your criteria and are available, on the search results page.

Headings included on the Company Results tab:

Select	Map	Company ▽	Trade Name ⬍	Suburb ⬍	# Empl. ⬍	Database	Industry
☑	📍	Matrix Marketing (Pty) Ltd		RANDBURG	30	Pre C N	MARKETING CONSULTANTS

Select: Tick in the box to select that company when you want to export or print that company. Multiple companies can be selected.

Map: Companies that are GEO coded will have a map pin displayed in this field. Clicking on the map pin will open up a separate window displaying the map of where that company is situated. You can also get directions to this company from any location.

(t) +27 (0) 11 886 0494   (w) www.matrixmarketing.co.za   (e) info@matrixmarketing.co.za

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Company: This field shows the registered/legal company name. This field is sortable from A – Z or Z – A (ascending or descending), click on the ⬍ next to the heading. Company names in red indicate companies that have been newly researched (researched in the last month). The company name is a hyperlink (indicated by the hand 🖑 when you mouse over the company name), when clicked, will open up the full company information page (as shown below).

Company Information

Company Info	People Info	IT Info	Notes

COMPANY CONTACT & LOCATION INFO

Company Name	Matrix Marketing (Pty) Ltd	Research Date	
Telephone	011 886 0494	Fax	011 886 9644
Staff	30		
Email	mail@matrixmarketing.co.za	Web	http://www.matrixmarketing.co.za
Postal	P O Box 1780 RANDBURG 2125	Street	147 Bram Fischer Drive RANDBURG 2194
Map	📍		
Industry	MARKETING CONSULTANTS		

Proxies

Reports

Turnover Proxy	10,000,000
BEE	No

No reports associated with this company.

COMPANY TRANSPORT & LOGISTICS INFO

ADDITIONAL COMPANY INFO

Trade Name: This field displays the trading name or division of the company. This field is sortable from A – Z or Z – A (ascending or descending), click on the ⬍ next to the heading.

Suburb: This field displays the suburb in which the company is situated. This field is sortable from A – Z or Z – A (ascending or descending), click on the ⬍ next to the heading.

 # Empl: (Number of Employees). This field displays the number of staff within that company. This field is sortable numerically (ascending or descending), click on the ⬍ next to the heading.

Database: This field indicates the dataset the company belongs to. A company can belong to multiple datasets, e.g. Pre, C, R.

Pre Premium dataset: Top Listed and unlisted companies
C Compubase dataset: Top IT end users
R Reseller dataset: IT Resellers
Pro Prospector dataset: Small, medium and large companies
N Indicates a user has made a note on that company.

Industry: This field displays the industry that the company trades in.

2. People Results Tab

To view all matching people attached to your search, click the people tab.

Remember: Your result will return more people than company records. People are linked to Companies. There may be more than one contact person per company.

Your search returned **187209** people – this tells you the total number of people that matched your criteria and are available to go through, on the search results page, under the People Results tab.

Headings included on the People Results tab:

Select	Salutation	Initials	Surname	Company	Responsibility	Position
☑	Ms	E	Suttie	Matrix Marketing (Pty) Ltd	Admin	Manager
☑	Mr	I	Jones	Matrix Marketing (Pty) Ltd	Divisional - GM	Director
☑	Mr	R	Campbell	Matrix Marketing (Pty) Ltd	Sales & Marketing	Director
☑	Mr	S	Miller	Matrix Marketing (Pty) Ltd	Sales & Marketing	Manager
☑	Mr	S	Trehair	Matrix Marketing (Pty) Ltd	Computing/IS/IT	Director
☑	Ms	E	Suttie	Matrix Marketing (Pty) Ltd	Financial	Manager
☑	Mr	S	Trehair	Matrix Marketing (Pty) Ltd	Managing	Director

Select: Tick in the box to select the person when you want to export or print that person's information. Multiple people can be selected.

Salutation, Initial and Surname: These fields display the contact person's details. These fields are individually sortable from A – Z or Z – A (ascending or descending), click on the ⬍ next to the heading.

The surname indicated in red, is a hyperlink (indicated by the hand 🖑 when you mouse over the surname), when clicked will open up the persons information page (as shown below).

Blank salutations, initials and surnames indicate a vacant position within that company which is searchable using the "Blank" operator.

Company: This field shows the registered/legal company name. This field is sortable from A – Z or Z – A (ascending or descending), click on the next to the heading.

Responsibility: This field displays the person's responsibility within the company. Blank responsibilities indicate that the contact falls within the Prospector dataset.

Position: This field displays the person's position (level of authority) within the company, i.e. Director, Manager, Sole Proprietor, Member and Employee.

Buttons Available on the Search Results Page:

At the bottom of the Search Results Page you will see a number of buttons available.

"Back" button: Returns the user to the previous screen used.

"Select All" button and **"Clear All"** button: These buttons are used to select or deselect the selection of companies or people previously ticked (selected) to export or print.

"Refine Search" button: directs the user to the refine search builder (see page 35 for more detail).

"Sort Notes First" button: Companies with notes will be sorted and displayed first on the search results screen (not in alphabetical order).

"Sort Notes Last" button: Companies with notes will be sorted and displayed at the end of the list.

"Not Sorted By Notes" button: Returns the results page back to the original sort order, i.e. no sort order (not in alphabetical order).

"Statistics" button: Displays statistics based on your search. Stats include information by dataset, number of email addresses and number of website addresses available in your results.

Search Statistics

Total	68359	100%
Premium	6947	10.2%
Premium Extended	0	0%
Prospector	58015	84.9%
Compubase	1335	2%
Reseller	2062	3%
Government	0	0%
People e-mail	51395	27.5%
Company e-mail	27524	41.2%
Web	6685	10%

Close

"Export" button: Export selected companies or people (see page 19 for more detail).

"Print" button: Print selected companies or people (see page 24 for more detail).

"Save Search" button: Allows the user to save the search criteria used for that search. These saved searches can be accessed at anytime in the future from the Saved Searches button on the main menu bar.

Tips & Hints

Located just under the Quick Company Search feature is "Tips & Hints". Listed here are quick helpful tips on navigating and using the system.

To read more click "**More...**" (as shown below).
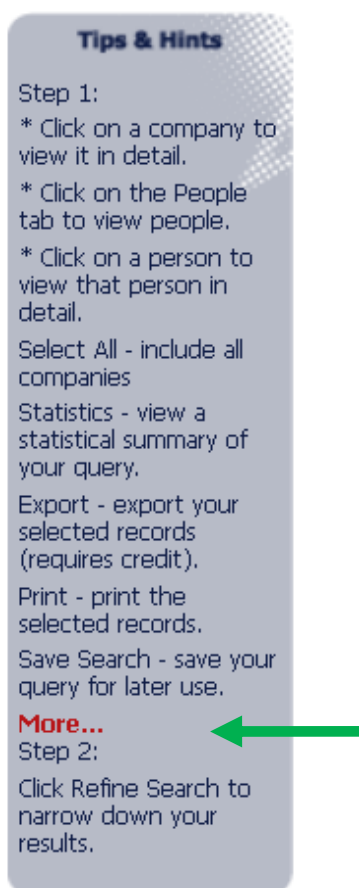
Tips & Hints are found on all pages for quick reference.

Exporting

The Export function is generally used by management or an administrator who will distribute the information to each team member. Not all users have access rights to export data.

Exporting - Step by Step

After selecting the companies or people you wish to export, Click the "Export" button. A separate window as shown below will open. There are a variety of options available when exporting data. This has been divided into 3 sections:

1. **Export Options**

➢ Mailing List: A mailing list is typically used for postal mailing campaigns. A selection of preset fields are included in a mailing list (as shown below).

Company Name	Trade Division	Salutation	Initials	First Name	Surname	Job Title	Postal Address Line 1	Postal Address Line 2	Postal Area	Postal Code
Matrix Marketing (Pty) Ltd		Ms	E	Erica	Suttie	Administration Manager	P O Box 1780		RANDBURG	2125
Matrix Marketing (Pty) Ltd		Mr	I	Ivor	Jones	Exec Director	P O Box 1780		RANDBURG	2125
Matrix Marketing (Pty) Ltd		Mr	S	Stuart	Miller	New Business Development Manager	P O Box 1780		RANDBURG	2125
Matrix Marketing (Pty) Ltd		Mr	S	Steven	Trehair	Managing Director	P O Box 1780		RANDBURG	2125

➤ Telephone List: A telephone list is typically used for prospecting. A selection of preset fields are included in a telephone list (as shown below).

KIRef No	RefNo	ExtNo	Salutation	Initials	First Name	Surname	Company Name	Trade Division	Job Title	Responsibility	Telephone Number	Fax Number
	4605	1	Ms	E	Erica	Suttie	Matrix Marketing (Pty) Ltd		Administration Manager	Admin	(011) 886 0494	(011) 886 9644
	4605	1	Mr	I	Ivor	Jones	Matrix Marketing (Pty) Ltd		Exec Director	Divisional - GM	(011) 886 0494	(011) 886 9644
	4605	1	Mr	R	Robert	Campbell	Matrix Marketing (Pty) Ltd		Sales & Marketing Director	Sales & Marketing	(011) 886 0494	(011) 886 9644
	4605	1	Mr	S	Stuart	Miller	Matrix Marketing (Pty) Ltd		New Business Development Manager	Sales & Marketing	(011) 886 0494	(011) 886 9644
	4605	1	Mr	S	Steven	Trehair	Matrix Marketing (Pty) Ltd		Managing Director	Computing/IS/IT	(011) 886 0494	(011) 886 9644
	4605	1	Ms	E	Erica	Suttie	Matrix Marketing (Pty) Ltd		Administration Manager	Financial	(011) 886 0494	(011) 886 9644
	4605	1	Mr	S	Steven	Trehair	Matrix Marketing (Pty) Ltd		Managing Director	Managing	(011) 886 0494	(011) 886 9644

➤ Additional Exports: Additional exports allow the user to select the fields they wish to export (discussed in detail on page 8).

Note: You may only select 1 of the above

2. Specify which People Records to Export

When exporting people records, the user has 2 options.

➤ All People: All contact people attached to a company will be exported by default, if you select companies from the "Company Results" tab.

➤ First Person Per Company: Some companies have multiple contact people attached to them. This option allows the user to specify that they only want to export one contact person per company.

➤ Selected People Only: This choice only becomes available, if you have selected people using the "People Results" tab.

3. Specify dedup options

Note: Dedup = Remove duplicates

➤ People Email: Any people records that have the exact same email address listed for a person will be removed and only 1 record will be kept. If a person is listed more than once in the dataset, the system will remove any duplicates of that person's email address and only keep 1 record.

➤ People First Name and Surname: The system will remove records listed more than once with the same first name and surname and only keep one record.

➤ Dedup People Applies Per Company Only: If an individual is listed more than once in a company the system will remove any duplicates and only list that individual once.

➤ Exclude Already Exported By Company: The system will remove records previously exported.
Note: This function is not applicable to telelists and mailing lists exported.

Additional Exports - Step by Step

Additional exports facility enables the user to choose specific fields to export, while viewing the cost of each record and field in real time.

You may select one or many fields. *See picture below.* Click the field you want to export, hold the "shift" button and highlight from top to bottom or use the "Ctrl" key and select the fields you wish to include (standard windows functionality).
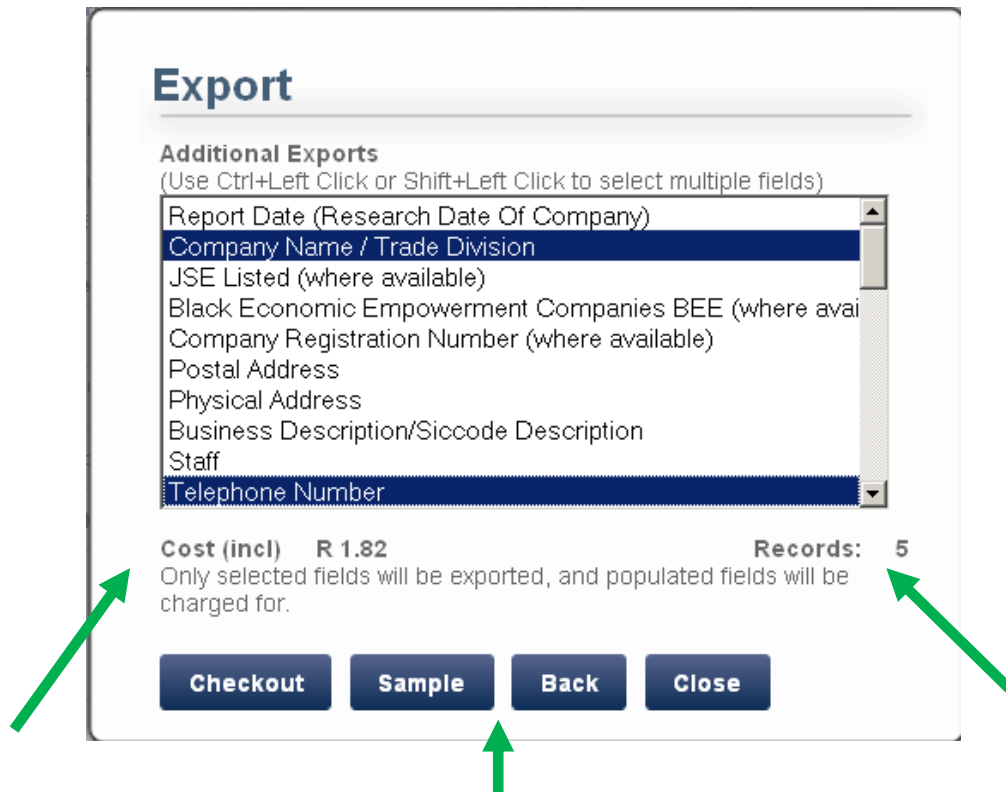

Indicated at the bottom left of the export box is the cost of the field/s selected calculated by the number of records previously selected. The number of records selected to export is shown at the bottom right of the export window.

Please note only selected fields will be exported. It is vitally important that you check the fields selected for export by clicking on the "Sample" button.
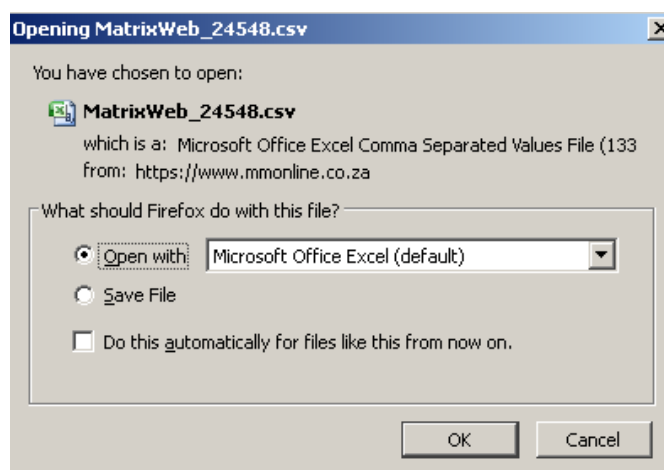
The sample file will show a sample of the fields and data as per your selection. If it is not what you wanted or you notice a field isn't included, close the sample file and go back and select your fields again.
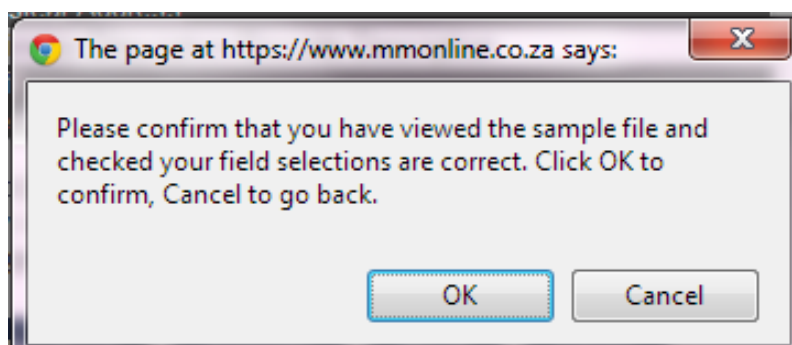
Please note only populated fields will be exported. For example, you select 10 companies to export and want to see their approximate turnover. 5 records are populated with turnover approximation and 5 records are not populated. All 10 records will be exported but you will only be charged for the populated turnover field which is 5 records.

Now that you have selected the fields you want to export and you have checked the sample file. You may proceed to the "Checkout" button.

Export Payment Method

Two payment options are available; credit card and prepaid credits.

It is recommended that you always use the Prepaid Credits Option first, accept the T & C's click "Purchase".

When using prepaid credits your available credits will be shown and once the export has been completed it will be deducted from your available credits.

Should you not have any available or sufficient credits, you can purchase using your credit card.

Once payment has been successfully processed, you will be prompted to download the file. Please click on **Download Export File.**
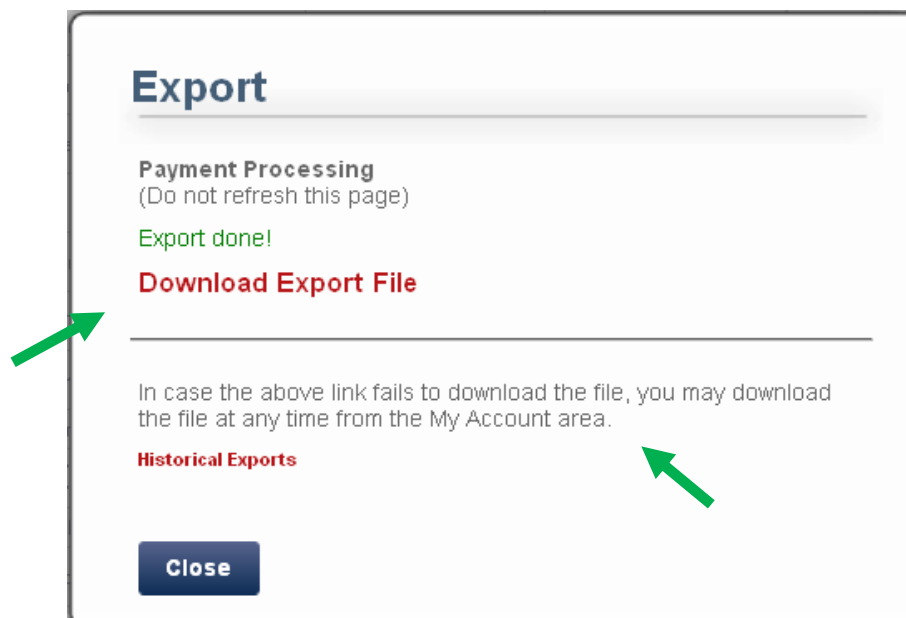
Should the download fail, you can re-download the file from the "My Account" button on the main menu bar or you can click on the "Historical Exports" link (to access you will need administrator rights).

After the download has completed you can click on the "Close" button which will return you to the Search Result page.

Printing – Step by Step

(Found on the bottom, second from the right of the search results page)

If you prefer working with hardcopy printouts, simply select the records you want and click the "Print" button. When selected from the Search Results Company tab, the window below will open up.

Select "All" databases to print from.
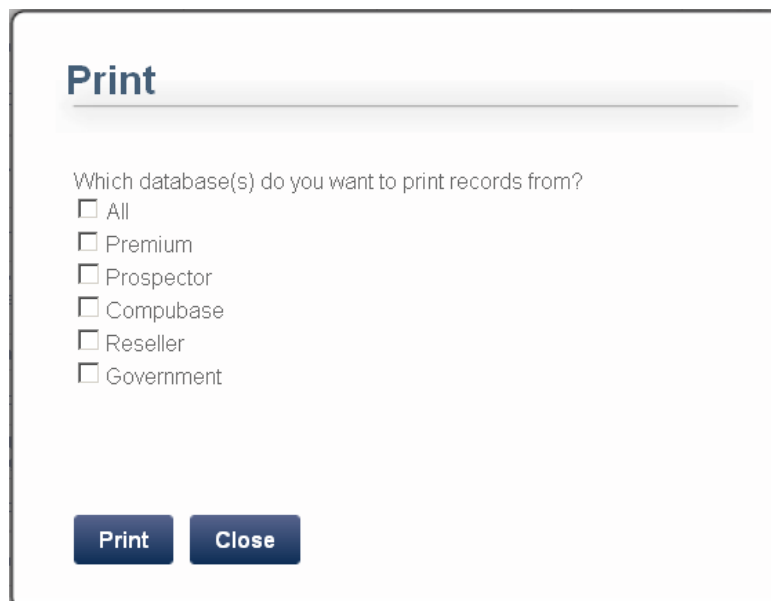
Standard payment options apply, select Prepaid Credits and accept the T & C's, click "Purchase".
Once payment has been successful processed you will be prompted to download the file.
You may open the file or save the file.
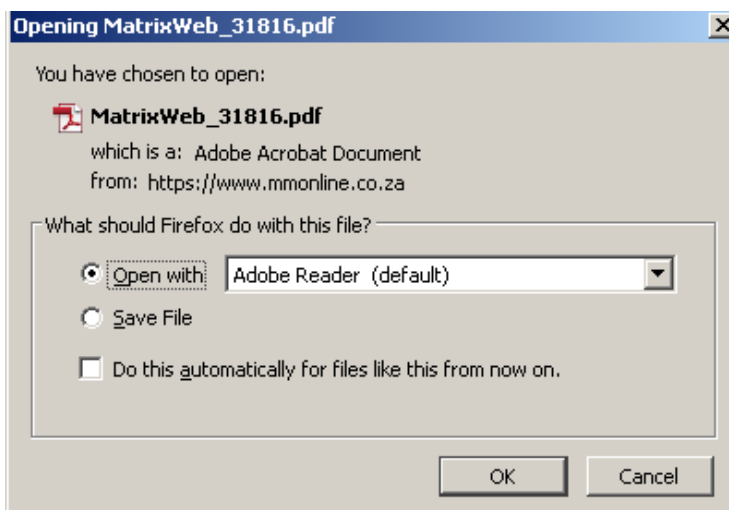
When selecting records from the Search Results "People tab", the following Print options are available.

1. Mailing List

If you select mailing list, the system will setup a postal mailing campaign which can be printed on Avery labels (as shown below).

Matrix Marketing (Pty) Ltd
Att: Ms Erica Suttie
Administration Manager
P O Box 1780
RANDBURG
2125

Matrix Marketing (Pty) Ltd
Att: Mr Stuart Miller
New Business Development Manager
P O Box 1780
RANDBURG
2125

Matrix Marketing (Pty) Ltd
Att: Mr Steven Trehair
Managing Director
P O Box 1780
RANDBURG
2125

2. Telephone List

If you select telephone list, the report will be setup with the same fields as discussed when exporting a telelists. These hardcopy reports can be distributed within your sales team for prospecting.

Matrix   Report printed: 08-08-2013 14:44

Tele-list

Matrix Marketing (Pty) Ltd

People

SAL	FIRST NAME/INITIAL	SURNAME	COMPANY	TRADE DIVISION	JOB TITLE	RESPONSIBILITY	TELEPHONE
Ms	Erica	Suttie	Matrix Marketing (Pty) Ltd		Administration Manager	Admin	(011) 886 0494
Mr	Stuart	Miller	Matrix Marketing (Pty) Ltd		New Business Development Manager	Sales & Marketing	(011) 886 0494
Mr	Steven	Trehair	Matrix Marketing (Pty) Ltd		Managing Director	Managing	(011) 886 0494

3. People Records

People records print option allows the user to print selected people from the People Results tab with all the relevant company information.

SAVE SEARCH

Save Search - Step by Step

(*Found on the bottom extreme right on a search results page*)

After carefully selecting your search criteria and viewing the search result it is advised to save the criteria to eliminate having to re-submit the same search criteria each time you need it.

Click the "Save Search" button. A "Saved Searches" window will pop up, click on the "Save" button.
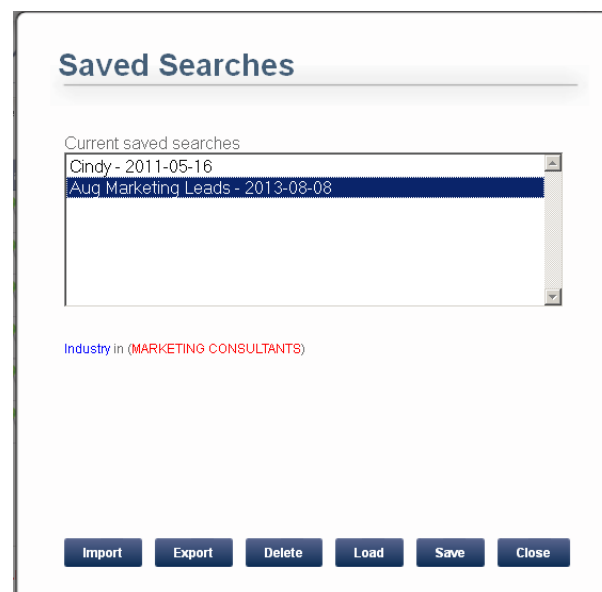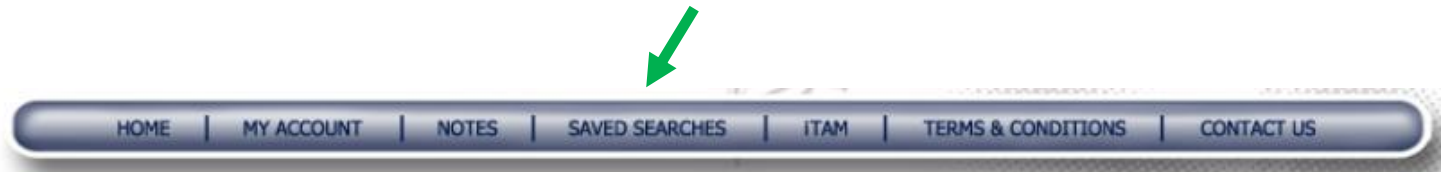

Enter a name for your search and click "Save".

Tip: Name your search according to the parameters you used, for example:

Aug Marketing Leads
Manufacturing >200 staff
Gauteng May 2013 CW

Your search has now been saved to the saved searches (as shown below).

To access your saved searches again click on the "SAVED SEARCHES" button on the main menu bar.

Here you can see and access all your saved searches.

Note: The system doesn't save the actual data for that search, the selection criteria is saved. The system is updated live every month, as such, new data is added and outdated information drops off.

When you click on the name of the search you want, you will notice at the bottom of the currently saved search box, a summary of the criteria used.
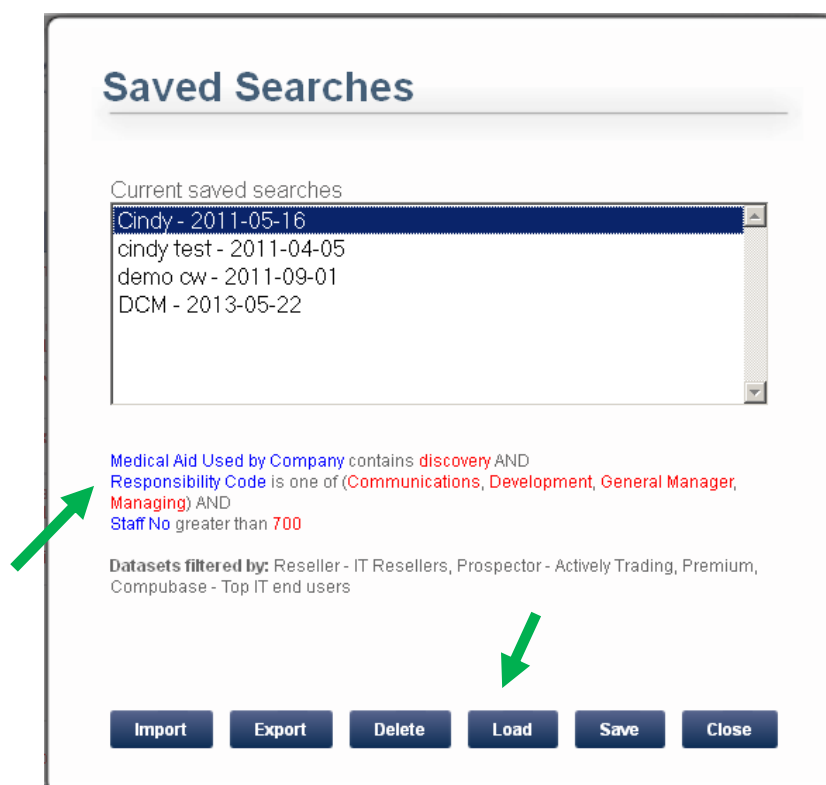
When you want to run a previously saved search, click on the name of the search you want to run and click the "Load" button.

The criteria from that search will be automatically loaded, you just need to click the "Search" button.
You can edit and add additional search criteria to the loaded search. To keep the changes, you must save the search again, under another name.

Should you no longer need a specific saved search, by clicking on the "Delete" button you will permanently delete that saved search.

To return to the previous page click the "Close" button.

Notes

Notes can be made on every record. The benefits of making notes:

> A sales person prospecting a company can identify that the company has been approached by another person in their organisation.
> A person making notes has access to information made by him/her and his/her colleagues from the first point of contact with that client.
> Notes can be printed out and/or exported to an Excel file for ease of access when following up.

Notes - Step by Step

The "Notes" functionality has 2 parts to it, we will discuss both.

1. Creating Notes:

When viewing a company record, click on the "Notes" tab as indicated below. All users accessing the system have the ability to create notes.

A. Quick Note: this is relevant to the sales cycle. There are a number of options to select from (see picture below). Selecting a quick note is optional.

B. Create New Note: add your own additional information.

Create New Note

Spoke to the decision maker. Meeting scheduled for
next week. Must email proposal through.

C. Schedule Calendar Reminders: Select a scheduled day to follow up with the company.

Schedule
Calendar
Reminder

		August, 2013					
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	28	29	30	31	1	2	3
32	4	5	6	7	8	9	10
33	11	12	13	14	15	16	17
34	18	19	20	21	22	23	24
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7

Today

Company Info	People Info	IT Info	Notes

Quick Note   --Select Quick Note--

Create New Note

Spoke to the decision maker. Meeting scheduled for
next week. Must email proposal through.

Schedule
Calendar
Reminder   Aug 19, 2013

Add Note

Click "Add Note" to save your note.

All saved notes on a record will be shown in the Saved Notes section (as shown below).

Users are able to see each other's notes. Newest notes added will be shown at the top of the list.

Saved Notes

Date ⊖	User ⊖	Note	Schedule Date ⊖	Actions
12-08-2013	Cindy	Spoke to the decision maker. Meeting scheduled for next week. Must email proposal through.	19-08-2013	🟢 🔴
26-05-2011	Sheila	Documentation sent Appointment Made	31-05-2011	🟢 🔴
17-07-2012	Stuart	Call at future date	19-07-2012	🟢 🔴

When a note is created a date is assigned to that note. This date is in red and is a hyperlink (indicated by the hand 👆 when you mouse over the date), when clicked, it will open up the note detail (as shown below).

Note Details

Captured By	Cindy
Captured On	12-08-2013
Company Name	*Matrix Marketing (Pty) Ltd*
Followup Date	19-08-2013
Note	Spoke to the decision maker. Meeting scheduled for next week. Must email proposal through.

Note: Hyperlink to full Company detail page.

Close

Clicking on edit icon 🟢 allows the user to make changes to that saved note.

Clicking on the delete icon 🔴 will delete that saved note, if you are licensed to this right.

2. Accessing Saved Notes:

Conveniently placed on the main menu bar is a button called "NOTES" (as shown below). All notes created can be viewed here.

| HOME | MY ACCOUNT | NOTES | SAVED SEARCHES | iTAM | TERMS & CONDITIONS | CONTACT US |

All Current and Future Notes

Select	Captured Date ⊖	User Name ⊖	Company Name ⊖	Text ⊖	Followup Date ⊖
☐	**13-08-2013**	Cindy	Isowall S A (Pty) Ltd	Documentation sent	28-08-2013
☐	**12-08-2013**	Cindy	Uno Engineering C C	Call at future date	12-08-2013
☐	**12-08-2013**	Cindy	Matrix Marketing (Pty) Ltd	Spoke to the decision maker. Meeting scheduled for next week. Must email proposal through.	19-08-2013
☐	**12-08-2013**	Cindy	Sasol Limited	Appointment Made	12-08-2013
☐	**07-08-2013**	Evangelia	Vodacom Group Limited	Appointment Made with Jacques	14-08-2013
☐	**06-08-2013**	Michaelo	A B B S A (Pty) Ltd	Appointment Made	07-08-2013

Headings above:

Select: Tick in the box to select the note you want to export or print. Multiple notes can be selected.

Capture Date: This is the date that the note was created on. This field is sortable from A – Z or Z – A (ascending or descending), click on the [icon] next to the heading. The date is a hyperlink (indicated by the hand [icon] when you mouse over the date), when clicked, it will open up the note detail.

User Name: Shows the name of the user who created the note. This field is sortable from A – Z or Z – A (ascending or descending), click on the [icon] next to the heading.

Company Name: This field shows the name of the company that the note was created on. This field is sortable from A – Z or Z – A (ascending or descending), click on the [icon] next to the heading.

Text: This field shows the information added by the user about that record. This field is sortable from A – Z or Z – A (ascending or descending), click on the [icon] next to the heading.

Follow-up Date: This field shows the date scheduled for a follow up as created by the user. This field is sortable from A – Z or Z – A (ascending or descending), click on the [icon] next to the heading.

There are a number of additional functions available to manage the Notes.

Backup	Restore	Reassign	Export	Print	Delete	Back

"Backup" button
The "Backup" button allows the Company Administrator to backup all notes made by all users within the company.

"Restore" button
The "Restore" button allows the Company Administrator to restore the backup file of notes made.

"Re-assign" button
The "Re-assign" button allows the Company Administrator to reassign notes from one user to another. When users leave a company, their notes can be assigned to the new user.

"Export" button
The "Export" button allows licensed users to select notes that they wish to export to Excel.

"Print" button
The "Print" button allows licensed users to select notes that they wish to print.

"Delete" button
The "Delete" button allows the Company Administrator to delete notes from the system.

"Back" button
The "Back" button returns the user to the previous screen used.

Filtering/Sorting Options on Notes:

Past Notes	Today's Notes	Upcoming Notes	No Followup Date

Past Notes

To filter or sort and access notes created that had a follow up date in the past; click the "Past Notes" button.

All Past Notes

Select	Captured Date ⊖	User Name ⊖	Company Name ⊖	Text ⊖	Followup Date ⊖
☐	**06-08-2013**	Michaelo	A B B S A (Pty) Ltd	Appointment Made	07-08-2013
☐	**02-08-2013**	Zama	Rhodes Food Group (Pty) Ltd	Appointment Made jdf jdfhn djdfjdidhj	09-08-2013
☐	**31-07-2013**	Zama	Ripple Enterprises C C	Appointment Made wjhjhsgf sdhfdjf shdgbf dfhlesdhf sfhwhhgysdrsdhjfd,j	31-07-2013
☐	**29-07-2013**	Cindy	Bytes Technology Group (Pty) Ltd	Testing - CW	31-07-2013

Today's Notes

To filter or sort and access notes that need to be followed up today; click the "Today's Notes" button.

All Current Notes

Select	Captured Date ⊖	User Name ⊖	Company Name ⊖	Text ⊖	Followup Date ⊖
☐	**12-08-2013**	Cindy	Sasol Limited	Appointment Made	12-08-2013
☐	**12-08-2013**	Cindy	Uno Engineering C C	Call at future date	12-08-2013
☐	**12-08-2013**	Cindy	Isowall S A (Pty) Ltd	Documentation sent	12-08-2013

Upcoming Notes

To filter or sort and access notes created with a follow-up date that hasn't occurred yet; click the "Upcoming Notes" button. This is a good indication of which prospects will be actioned in the near future.
In the Follow-up Date field, you will see all the notes that are coming up according to the date.

Select	Captured Date ⊖	User Name ⊖	Company Name ⊖	Text ⊖	Followup Date △
☐	**07-08-2013**	Evangelia	Vodacom Group Limited	Appointment Made with Jacques	14-08-2013
☐	**02-08-2013**	Zama	G P Retail Operations (Pty) Ltd	Appointment Made f dfdfhajdufh jdfjdfkhdscnj	15-08-2013
☐	**26-07-2013**	Michaelo	Imperial Holdings Limited	Call at future date	15-08-2013
☐	**12-08-2013**	Cindy	Matrix Marketing (Pty) Ltd	Spoke to the decision maker. Meeting scheduled for next week. Must email proposal through.	19-08-2013
☐	**29-07-2013**	Michaelo	Eris Property Group (Pty) Ltd	Call at future date	20-08-2013
☐	**22-07-2013**	Michaelo	Novo Nordisk (Pty) Ltd	phone back	21-08-2013
☐	**05-08-2013**	Zama	ArcelorMittal South Africa Limited	Appointment Made hfdjah fchdfhj dfjndfhhjjjk	22-08-2013
☐	**05-08-2013**	Matthew	3663 First For Food Service (Pty) Ltd	uhbuhnhhnm	30-08-2013
☐	**05-08-2013**	Matthew	3663 First For Food Service (Pty) Ltd	ygbuhnjio	30-08-2013
☐	**30-07-2013**	Michaelo	Remgro Management Services Limited	Call at future date	30-08-2013
☐	**25-09-2012**	Stuart	Browns & Weirs Cash & Carry (Pty) Ltd	Call at future date	01-10-2013
☐	**16-10-2012**	Stuart	D P D Laser Express Logistics (Pty) Ltd	Call at future date	15-10-2013

No Follow-up Date

To filter or sort and access all notes that do not have a follow up date, click the button "No Follow-up Date".

All Unassigned Notes

Select	Captured Date ⊖	User Name ⊖	Company Name ⊖	Text ⊖	Followup Date ⊖
☐	01-08-2013	Matthew	3663 First For Food Service (Pty) Ltd	Need more time	
☐	26-06-2013	Stuart	Wurth (S A) (Pty) Ltd	Call at future date	
☐	26-06-2013	Stuart	Wurth (S A) (Pty) Ltd	Call at future date Uses Nissan at the moment - replacing in October	
☐	19-06-2013	Matthew	Murray & Roberts Limited	MC	
☐	19-06-2013	Matthew	Gabler Medical (Pty) Ltd	Appointment Made	
☐	07-06-2013	Matthew	Oceana Brands Limited	Appointment Made sl;fk;lSKEF dont	
☐	29-05-2013	Matthew	Barloworld Handling (Pty) Ltd	Appointment Made yuiyit	
☐	27-05-2013	Matthew	Fourway Haulage S A (Pty) Ltd	Appointment Made 31 Sep	

Refined Search Builder

The "Refine Search" option can be accessed by using either the "Refine Search" [Refine Search] button located at the bottom of the Search Results page.

or

You can click the "Refine Search" icon [Refine Search +] on the left of the page just under Tips & Hints.

The Refine Search Builder allows users to search all fields across all datasets, enabling them to slice and dice data for specific queries.

Refined Search Builder - Filter Functions

The first function available on the Refined Search Builder page, are the "Filter By" options (as shown below).

These filters enable users to filter the database by a specific product/s.

Available Products — Shows which products you are licensed to

Unavailable Products — Shows which products you are NOT licensed to

Activated Filter — Shows products currently in filter mode

Clicking on one of the above radio buttons (filters) will deactivate that product (as shown below).

The list below shows only Premium records with notes attached as per the selected filter buttons above.

Select	Map	Company	Trade Name	Suburb	# Empl.	Database	Industry
☐	📍	G & B Coal Mining (Pty) Ltd		MIDDELBURG	260	Pre N	MINING
☐	📍	Advocate Solutions (Pty) Ltd		CENTURION	61	Pre N	COMPUTER PROGRAMMERS & CONSULTANTS
☐	📍	Fuelogic (Pty) Ltd		KEMPTON PARK	700	Pre N	TRANSPORTERS
☐	📍	Edenred S A (Pty) Ltd		WIERDA VALLEY		Pre N	ADVERTISING GIFTS & PROMOTIONAL PRODUCTS
☐	📍	Savino Del Bene (Pty) Ltd		ELANDSFONTEIN	700	Pre N	LOGISTICS

Company Results | People Results
Your search returned **599** companies.

There are four categories which can be segmented, namely:

1. **Company** – the Company category has 26 fields which can be searched. These are all relevant to company information.

2. **People** – the People category has 9 fields which can be searched. These are all relevant to the people within the companies.

3. **Compubase** - the Compubase category has 46 fields which can be searched. These are all relevant to the hardware and software of companies (please note this is a licensable product).

4. **Additional Info** - the Additional Info category has 7 fields which can be searched. These are fields of additional research relevant to companies.
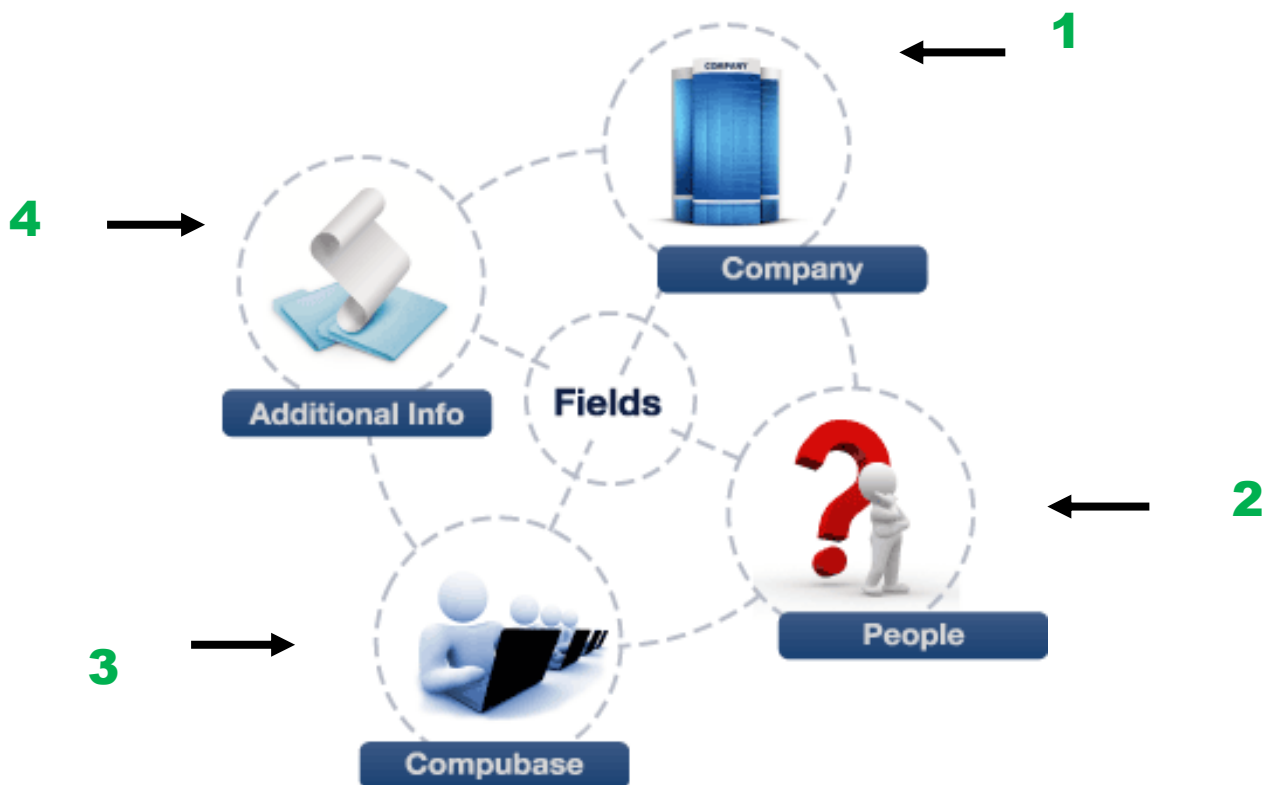
Any criteria selections made on the Search Builder page will be shown in the Refine Search Builder box (as shown below). You can continue to further refine your search or you may remove the criteria by clicking on the X .
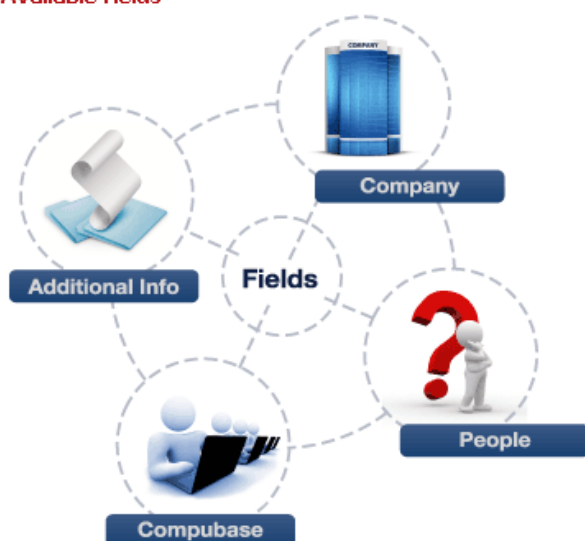
Gauteng Province and staff size between 5 and 10, previously selected on the Search Builder page has been pulled through to the Refine Search builder page.

1. Refine Search Builder – Company

Click on the Company icon, a drop down list will display the fields available for further searching. You can add additional fields by clicking on the field name. The field will automatically move into the Refine Search Builder box on the right.

For example, you can add Estimated Annual Turnover and Import/Export/Both

Adding your parameters:

Estimated annual turnover (between) 5000000 and 10000000,

Import/Export/Both (is one of) Import

Click "Search"

Example 2:

You are looking for:

Durban companies, using Discovery Health as their medical aid and you want to contact decision makers responsible for Personnel/HR.

Select fields:

Grouped Area
Medical aid used by the company
Responsibility Code

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Grouped area (is one of) Durban,
Medical aid used by the company ("contains" the word) Discovery,
Responsibility code (is one of) Personnel/HR

Click "Search"

2. Refine Search Builder – People

Click on the "People" icon, a drop down list will display the fields available for further searching. You can add additional fields by clicking on the field name. The field will automatically move into the Refine Search Builder box on the right.

For example, you can add Responsibility Code and Position Code.

Adding your parameters:

Responsibility code (is one of) Managing and Marketing,

Position code (is one of) Director and Manager

Click "Search"

Example 2:

You are looking for:

Female decision makers, specifically Directors and Managers, responsible for Sales and Marketing.

Select fields:

Salutation
Position Code
Responsibility Code

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Salutation (is one of) Mrs, Miss, Ms
Position Code (is one of) Director and Manager,
Responsibility Code (is one of) Sales and Marketing

Click "Search"

Explanation of People fields that can be filtered:

1. **Birthdate:** enables users to find directors age and birthdays that are found in the **Prospector Base only.** Example, directors aged between 34 and 69 years old.

How - Click on birthdate, two calendars appear select the first calendar and back-date it to the oldest group, i.e. people born 01/01/1944. On the second calendar select the youngest group, i.e. people born 01/01/1979.

Using the dropdown box, before the calendar, users can change their parameters to greater or less than a certain age group.

2. **Email:** enables users to filter through or for specific words in email addresses.

How - Click on Email, type in your requirement

Using the dropdown box, users can change the search parameter such as "contains" a certain word e.g. "*info*"@matrixmarketing.co.za, or "doesn't contain", "starts with" a certain word and "is blank" or "is not blank".

3. **Email Indicator:** enables users to filter for email addresses that are either Personalised or Generic. Personalised is usually what the contact person would use and goes directly to their email account, e.g. mike@matrixmarketing.co.za.

Generic is usually the email address used for the company or department e.g. info@matrixmarketing.co.za.

How - Click on Email Indicator, select from the options.

Using the dropdown box, users can change the search parameter.

4. **Job Title:** enables users to filter for people by job titles from the Premium Base only.

How - Click on Job Title

Using the dropdown box, users can change the search parameter such as "contains" a certain word, "doesn't contain", "starts with" a certain word, "is blank" or "is not blank".

5. **Level of Authority:** enables users to filter for decision makers from the Prospector Base only that have an authority level rating.

How - Click on Level of Authority, select from the options.

Using the dropdown box, users can change the search parameter.

6. **Position Code:** enables users to filter for decision makers by their position, available on the Premium and Prospector Base.

How - Click on position Code, select from the options.

Using the dropdown box, users can change the search parameter.

7. **Responsibility Code:** enables users to filter for decision makers by their responsibility from the Premium Base only.

How - Click on Responsibility Code, select from the options.

Using the dropdown box, users can change the search parameter.

8. **Salutation:** enables users to filters for male and/or female decision makers.

How - Click on Salutation, select from the options

Using the dropdown box, users can change the search parameter.

9. **Surname:** enables users to filter for decision makers with or without a specific surname.

How - Click on Surname, type in your requirement

Using the dropdown box, users can change the search parameter such as "contains" a certain word, "doesn't contain", "starts with" a certain word, "is blank" or "is not blank".

3.   Refine Search Builder – Compubase

Click on the Compubase icon, a drop down list will display the fields available for further searching. You can add additional fields to your search by clicking on the field name. The field will automatically move into the Refine Search Builder box on the right.

If you don't have access and would like to view the Compubase Dataset, please contact Matrix Marketing (Pty) Ltd on 011 886 0494 or info@matrixmarketing.co.za.

Compubase Refined Search Builder: allows the user to filter through the most dominant brands of hardware, software and internet services utilised within the top 1300 IT end user companies in South Africa.
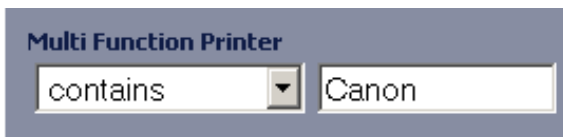
In total there are 46 fields that a user can filter by. There are 29 hardware fields, 14 software fields and 3 service provider fields. An example of each is shown below.

The system allows for 2 search functions on Compubase fields:

You will see that most fields are listed twice; one instance is followed by the word "List" and the other isn't.

Fields that don't have the word "List", enable users to type the brand into the text box (as shown below).

Fields that do have the word "List", enable users to select multiple brands and variations of that brand (as shown below).

Examples of searching the different compubase fields:

Hardware specific field:

Adding your parameters:

Multi Function Printer ("contains" the word) Canon

Click "Search"

Example 2:

You are looking for:

Gauteng companies using Mecer as their Note Book Brand, and you want to contact decision makers responsible for Computing/IS/IT.

Select fields:

Province
Responsibility Code
Notebook Brand List

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Province (is one of) Gauteng,
Responsibility (is one of) Computing/IS/IT,
Notebook Brand List (is one of) Mecer...

Click "Search"

Software specific field:

Adding your parameters:

ERP System ("is one of")
S A P

Click "Search"

Example 2:

You are looking for:

Companies with more than 50 staff, using Pastel and/or VIP as their Payroll software.

Select fields:

Staff No
Payroll Software List

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Staff No (greater than) 50
Payroll Software List (is one of) Pastel/V I P

Click "Search"

Service specific field:

Adding your parameters:

Connectivity ("contains" the word) Diginet

Click "Search"

Example 2:

You are looking for:

Companies in the Eastern Cape, Free State, Gauteng and Kwazulu-Natal, using Internet Solutions as their Internet Service Provider.

Select fields:

Province
Internet Service Provider

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Province (is one of) Eastern Cape, Free State, Gauteng, Kwazulu-Natal,
Internet Service Provider ("contains" the word) Internet Solutions

Click "Search"

4. Refined Search Builder – Additional Info

Click on the Additional Info icon, a drop down list will display the fields available for further searching. You can add additional fields by clicking on the field name. The field will automatically move into the Refine Search Builder box on the right.

Additional Info Refined Search Builder: allows the user to filter through additional fields profiled on the company.

Explanation of fields:

➢ **Company Auditor:** enables users to search the database for a specific auditor being used by a company or to list all companies that make use of an auditor. For example, to list all companies making use of an auditor, select the "is not blank" drop down.

➢ **Company Reg Number:** enables users to search the database for all companies with a Registration number. Furthermore users can identify companies registered within a specific year, using the "starts with" operator.

➢ **JSE Listed:** enables users to identify which companies are listed on the JSE.

Medical Aid Used By the Company: enables users to search the database for companies using a specific medical aid, as well as companies that do not have a medical aid.

➢ **Number of PCs within a Company:** enables users to search the database for companies using an approximate number of PC's.

Example of searching an Additional Info field:

Adding your parameters:

JSE Listed ("is one of") Yes

Click "Search"

Example 2:

You are looking for:

Companies in Midrand and the Northern Suburbs, using PricewaterhouseCoopers Inc as their auditors.

Select fields:

Company Auditor
Grouped Area

Once your fields have been selected you can now drill down to the specifics of each, e.g.

Company Auditor ("contains" the word) Price,
Grouped Area (is one of) Midrand, Northern Suburbs

Click "Search"

iTAM

If you don't have access to view the iTAM module, please contact Matrix Marketing (Pty) Ltd on 011 886 0494 or info@matrixmarketing.co.za.

The "iTAM" module is used as a strategic tool for Identifying your Total Available Market. This application is an add-on product and if licensed, can be accessed through the "ITAM" button on the main menu bar.

| HOME | MY ACCOUNT | NOTES | SAVED SEARCHES | iTAM | TERMS & CONDITIONS | CONTACT US |

Select from the 3 demographics:

- Geographical
- Industry
- Company size

Highlight the relevant demographics displayed in the filters.

The 3 selectors above give you the opportunity to choose what information you want displayed in your report.

Once selected click "Search", the iTAM report provides you with the number of companies matching your criteria selected by Geographic, Industry and Size of company (as shown below):

TERRITORY	SECTORS	SMALL (1 - 35)	MEDIUM (36 - 55)	LARGE (56+)	TOTAL PER SECTOR	TOTAL FOR TERRITORY
Gauteng	Agriculture	117	16	90	223	26665
	Automotive	1168	158	337	1663	
	Construction	1958	293	543	2794	
	Education	109	23	64	196	
	Engineering	376	52	98	526	
	Financial Services	217	40	190	447	
	Food Production	265	65	211	541	
	Government & Social Services	246	35	147	428	
	Healthcare	140	18	103	261	
	Hospitality	287	75	119	481	
	IT & Telecoms	1094	120	256	1470	
	Manufacturing	2808	678	1455	4941	
	Media & Entertainment	117	11	59	187	
	Mining	113	20	156	289	
	Petrochemical	103	18	49	170	
	Pharmaceutical	458	54	126	638	
	Professional & Administrative	1424	139	536	2099	
	Property	222	16	49	287	
	Retail	2275	205	348	2828	
	Transport & Logistics	916	108	353	1377	
	Wholesale	3910	341	568	4819	
	TOTALS	18323	2485	5857		

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

Explanation of the iTAM report as above:

1. **Territory:** This field shows the province/s selected by you.

2. **Sectors:** This field shows the Industry/s selected by you.

3. **Small (1-35 staff):** This field shows the number of companies within the "small" (1-35) staff size bracket as requested by you.

4. **Medium (36-55 staff):** This field shows the number of companies within the "medium" (35-55) staff size bracket as requested by you.

5. **Large (56+ staff):** This field shows the number of companies within the "large" (56+) staff size bracket as requested by you.

6. **Total per Sector:** This field shows the total number of companies per sector (industry) as selected by you.

7. **Total for Territory:** This field shows the total number of companies per territory (province) as selected by you.

TERRITORY	SECTORS	SMALL (1 - 35)	MEDIUM (36 - 55)	LARGE (56+)	TOTAL PER SECTOR	TOTAL FOR TERRITORY
Gauteng	Property	222	16	49	287	287
	TOTALS	222	16	49		

The numbers displayed in red are hyperlinks (indicated by the hand 👆 when you mouse over the number), when clicked, will open up the list of companies that fall into that bracket (as shown below). For example, there are 49 companies in the Property Sector classified as large companies with a staff size greater than 56.

Your search returned **49** companies.

Company ⊖	Trade Name ⊖	Geographical Area	Industry	Size	Notes
Vincemus Investments (Pty) Ltd	Ponte City	Gauteng	Property	Large	
Hydro Holdings (Pty) Ltd		Gauteng	Property	Large	N
Eris Property Group (Pty) Ltd		Gauteng	Property	Large	N
A F H C O Property Management (Pty) Ltd		Gauteng	Property	Large	
Liberty Properties (Pty) Ltd	Head Office	Gauteng	Property	Large	
Unihold Group Limited	Head Office	Gauteng	Property	Large	

The iTAM module is setup by Matrix Marketing (Pty) Ltd after consulting with you about the strategy that best suits you.

Note: Company size can be set by either number of staff, estimated annual turnover or fleet size.

Company Size

Staff Size
☑ Small — From [1] to [35] employees
☑ Medium — From [36] to [55] employees
☑ Large — More Than [56] employees
☐ Corporate

OR

Fleet Size
☐ Small
☐ Medium
☐ Large
☐ Corporate

Turnover Proxy Size
☐ Small
☐ Medium
☐ Large
☐ Corporate

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The iTAM module is used in different applications within businesses, namely:

1. Strategic planning
    o It shows the number of businesses where you have potential for sales.

2. Territory segmentation
    o Assists in distributing leads to consultants fairly and in line with their strengths, whether it be by area, size or industry.

3. Budget planning
    o As we comprehensively research the actively trading market in South Africa, many businesses use the iTAM results as an indication of potential new business and what portion of that can be obtained by them.

My Account

"My Account" is only accessible if you have Administrator rights. This facility is used for a number of reasons, namely:

➤ Knowing what Matrix Marketing products you are licensed to
➤ Knowing your contract period
➤ Knowing who your Matrix Marketing sales representative is, as well as their email address
➤ Knowing how many users are licensed to the mm online platform
➤ Knowing who the licensed users are, when they received their login credentials and what the date and time was of their first login and whether those users are active or inactive

The Administrator has further access to view:

➤ the account history and see what credits are still available
➤ export and print history
➤ usage of the mm online platform

Find us on YouTube – Matrix Marketing SA - for news, views and sales tips

Do not hesitate to contact us if you have any queries or need further assistance.